

Assisted living Advisor

A resource for assisted living providers serving low income seniors

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THIRD HUD CONVERSION PROGRAM OPENS

On December 14, 2005, Southcrest Manor II Assisted Living in Waukon began accepting clients into their affordable assisted living program. The 16-unit program was built under the Housing and Urban Development (HUD) AL conversion program.

HUD AL conversion grant recipients receive funding to convert qualifying senior living properties to assisted living units for low- to moderate-income clients. The program is designed to serve clients

who meet HUD's frailty definition. Under this definition, clients must need assistance with three activities of daily living (i.e., bathing, dressing, and grooming).

The rent in assisted living units created through the HUD conversion program is subsidized by HUD. Qualifying tenants are responsible for board and services. Board may include such items as activities and emergency response, which are required by Iowa assisted living law.

Services may be paid for by the client or by government programs for tenants who qualify. Many of the clients in affordable AL properties receive services through the Home and Community Based Services elderly waiver, which covers the program's cost of providing personal and health-related care to eligible clients. Waiver eligibility is determined by the local Area Agency on Aging.

Oneota Housing in Decorah and Cedar Place in Story City were also built under the HUD AL conversion program.

Inside this issue:

Marketing affordable AL	2
Tenant evacuations	3
Life safety reminders	3
Older Iowans handbook	4

HCBS AL WAIVER UPDATE

The Iowa Department of Human Services (DHS) continues to work with stakeholders to formulate a request to the Centers for Medicare and Medicaid Services (CMS) to add assisted living as a payment under the Home and Community Based Services (HCBS) elderly waiver.

The group was working under the assumption that an AL waiver payment

could be set above \$1,052, the current cap under the HCBS elderly waiver. In a recent communication from CMS, DHS was advised that the AL payment cannot exceed the current allowable maximum for all HCBS elderly waiver enrollees.

It was the consensus of the group that DHS should pursue an AL payment under the HCBS elderly waiver at the current cap. This would streamline the billing

process and eliminate the use of consumer directed attendant care (CDAC) as the primary payer source.

The stakeholder group has consistently identified the current cap as inadequate for serving some waiver clients in assisted living. Providers have indicated they will lobby for a higher reimbursement for all providers serving clients under the HCBS elderly waiver in the 2006 legislative session.

Regulatory reminders

- Service plans must be performed prior to occupancy, within 30 days of occupancy, and at least annually. They must also be updated upon significant change in the tenant's condition.
- Re-evaluation upon return from the hospital or nursing home is required only if the event triggered a change in the tenant's functional, cognitive, or health status.

MARKETING YOUR AFFORDABLE ALP

There are tried and true methods to market assisted living. Building referral sources, designing effective advertising, and creating a positive image for your facility are all important components in marketing any assisted living program. But affordable assisted living programs are searching for an entirely different clientele than market rate programs. The question then becomes, how can we reach low- to moderate-income clients who would benefit from our affordable assisted living program?

Referral sources

Building referral sources is a critical component of any assisted living marketing plan. Marketing staff should build a strategy and focus efforts on building relationships with other health care providers, including nursing homes, hospitals, home health agencies, and senior housing programs.

Efforts should be geared toward identifying where the desired clientele currently reside within the long-term care continuum. For instance, marketing staff should focus primarily on nursing homes that offer skilled care and those currently caring for clients under the Medicaid system.

Efforts to build relationships with home health agencies should be directed toward Medicare-certified home health agencies. These agencies provide care to low- to moderate-income clients served under the Title 19 Home Health Service program and the Home and Community Based Waiver program. Clients served through these programs are the target clientele for affordable assisted programs.

The affordable AL marketing plan should also include a plan for reaching out to senior housing programs designed for low- to moderate-income clients. Housing programs where clients are receiving rental

assistance or other HUD and/or USDA rental assistance are excellent referral sources for affordable AL programs.

Educating health care providers

Assisted living is still a mystery to many health care professionals. While many social workers and discharge planners are gaining an understanding of the capabilities of assisted living providers, they may be unaware that assisted living is an option for low- to moderate-income seniors.

Brainstorm with staff to identify creative ways to educate health care providers in the community and the surrounding area on what your program is about and whom you are looking to serve.

Advertising

Affordable AL programs often times work on very limited advertising budgets. Placing brochures in locations frequented by low- to moderate-income clients can be an effective marketing tool. Gathering points are different in every town in Iowa. Maybe seniors gather at the grocery store deli for breakfast every morning. Or maybe they meet at the local fast food restaurant for coffee. Senior centers are an excellent place to connect with low-income seniors. Ask permission to give a short presentation and hand out ice cream bars, or offer to provide a dessert after a congregated meal at your senior center.

It is best not to include prices in advertising and marketing materials. Affordable assisted living programs are designed to serve clients with a wide range of income and assets. Invite interested individuals to come for a free assessment so you can determine exactly what their needs are and what the price might be. Providing prices can scare off clients who may not have sufficient income to afford the program but who may be

Tips for

Educating Health Care Providers

- ✓ Host an open house for social workers and discharge planners during National Social Worker's Month in March.
- ✓ Seek permission to present a one-hour educational session to hospital discharge planners. Provide an overview of assisted living and specific information about how affordable programs differ from market rate programs.
- ✓ Invite staff from market rate assisted living programs in the area for a tour. They may have clients who are spending down and may soon need your services.

eligible for assistance with rent and/or services.

Create a positive image

Most affordable living programs have found word of mouth to be their most effective form of advertising. Clients will talk to family and friends about the excellent care and service they receive. Tenants may have a friend or former neighbor who would benefit from your program.

Make a plan!

Every assisted living program should have a formal, written marketing plan. This plan should include goals that are measurable, names and dates of people and organizations to visit, and a mechanism for periodic analysis of the efficacy of the plan.

For more information about marketing your affordable assisted living program, visit the IFA website (www.ifahome.com; Senior Living; Affordable Assisted Living; Documents Available; Marketing Affordable Assisted Living).

USING TENANT VOLUNTEERS FOR EVACUATION

A gray area of the Assisted Living requirements for emergency planning evacuation is who, how and when to assist tenants during an evacuation drill or actual emergency. While it is impossible to describe actions to take in all situations, the following information should provide some guidance to AL programs.

Management is required to establish a resident assistance plan that describes the actions to be taken in both fire drills and actual emergencies. The assistance plan should include documentation of management's ability to assist residents that have temporary or permanent mobility issues, vision, hearing or any other disabilities that would impair evacuation during a fire drill or actual emergency. Consider the following:

- Create a priority list for resident evacuations, including special notes on how the resident should be evacuated (i.e., wheelchair, stand by assist, etc.).
- Document residents with disabilities and train staff on all shifts to following specific procedures for each resident during a drill or emergency.



LIFE SAFETY TIPS FOR AL PROVIDERS

Provided by
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- The required time for evacuation is less than 13 minutes, which means that from time to time residents who develop disabilities may need to be moved to a different apartment to comply with a 13-minute evacuation. It is not reasonable to expect staff on duty to provide personal assistance to all residents with disabilities and comply with the 13-minute evacuation requirement of the Life Safety Code.
- Management is encouraged to train tenants to assist each other during an evacuation. However, it is important that volunteers understand the proper procedures for evacuating tenants in order to minimize the risk of personal injury to the volunteer and the tenant. Management should encourage the "Buddy System" during a fire drill or actual emergency.

To be successful in evacuating tenants safely, AL programs must have trained resident volunteers who are willing to assist other residents with disabilities during a fire drill or actual emergency. The training should include the following elements:

- Equipment that may be utilized to expedite the evacuation
- How to physically assist another resident in walking without causing personal injury (i.e., a specific resident should be assisted by holding his/her hands and walking backwards; another resident may need to be stabilized by interlocking arms, etc.)
- Acting out potential fire or other emergency situations during planned drills
- Showing residents how to remove persons with disabilities on a sheet, how to provide first aid, and other life saving techniques
- Discussion about the need for the volunteer and the tenant to remain low to the ground in the event of a fire.

It would be beneficial to solicit the tenant's interest in serving as a volunteer during evacuations at the time of admission. Having the tenant sign up to volunteer will also relieve the AL program of liability in the event that the tenant or the individual they are assisting is injured during an evacuation. A sample release form is available on the IFA website (www.ifahome.com; Senior Living; Affordable Assisted Living; Documents Available; Affordable AL Policy Manual; Life Safety Manual; Tenant Evacuation Volunteer Release Form).

Remember, the first step to saving a life is adequate training and practice. Use the six required fire and evacuation drills as a teaching opportunity to reinforce safe evacuation procedures.

Life Safety Plans Must Include:

- Emergency plan
- Fire safety procedures
- Personal emergency info.
- Provisions for revising plan
- Provisions for training employees
- Smoking regulations
- Testing of smoke control system
- Evacuation of tenants
- Procedures for reporting
- Procedures for documenting

Tip: It's a good idea to keep a clipboard with your evacuation plan, current tenant roster, priority list for evacuating tenants, and blank sheets for documenting the results of the fire drill in a place that makes it easily retrievable by staff. Assign responsibility for documenting fire drills (i.e., senior staff member on duty).

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The Iowa Finance Authority is committed to providing opportunities for individuals and organizations to expand housing opportunities to low and moderate income families and individuals. Jenny Knust, Affordable Assisted Living Coordinator, serves as a technical advisor to programs seeking to serve low to moderate income seniors in the assisted living environment. The position is funded by a grant from the US Department of Agriculture, Rural Community Development Initiative. This publication is designed to serve as a resource for RCDI grant recipient organizations and others who are developing and/or managing affordable assisted living programs.

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Visit our website at
www.ifahome.com
(look under "Senior Living," and
"Affordable Assisted Living")

EDUCATION IS ESSENTIAL

Resource answers seniors' legal questions

In 2005, the Young Lawyers Division of the Iowa State Bar Association published the sixth edition of, "Handbook for Older Iowans." The book is intended to provide helpful information about the law and resources of special interest to elderly Iowans. The information is general in nature and is not intended to be substituted for the advice of a lawyer.

The handbook is divided into two parts. The first part covers a number of legal topics of special interest to the elderly, providing general information about each topic. The second part lists programs and resources which provide important services to Iowa's elderly.

The publication covers the following topics:

- Age discrimination & employment
- Consumer protection
- Elder abuse & neglect
- Federal income taxes
- Food assistance
- Funerals
- Grandparent visitation
- Guardianship & conservatorship
- Landlord/tenant
- Living wills
- Long-term care insurance
- Long-term care facilities
- Medicaid
- Medicare
- Medigap
- Multi-party bank accounts
- Power of attorney
- Property tax relief for elderly
- Reverse mortgages
- Revocable trusts
- Social security benefits
- Veterans benefits
- Wills

Long-term care providers can arrange to pick up one or two boxes (50 brochures each) at no charge at the Iowa Bar Office, located at 521 East Locust, Des Moines, IA 50309-1939, by calling Barb at 515-243-3179. Orders of three or more boxes may be requested by calling Bill Miller at 515-246-5856.